



Proposal for Implementation Planning Services

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INTRODUCTION:

The recently completed Steamship Authority operations review, which culminated in *A Comprehensive Review of the Steamship Authority's Operations* (the Report), provided a set of recommendations for potential improvements. These recommendations are designed to address the issues that were identified within ferry operations and maintenance, IT, public communications, and the management structure of the organization, which led to an erosion of public trust in the Spring of 2018.

It is our understanding that the Steamship Authority (SSA) recognizes the importance of adopting the recommendations and implementing them in an efficient and effective manner. Doing so requires a well thought out and detailed plan that prioritizes their implementation based on a clear understanding of the objectives, resources required, costs, and timeframe for each. Once prioritized, the Steamship Authority must develop a plan which establishes a strategy for their implementation, assigns responsibilities, and establishes budgets and schedules for each.

This proposal is for tasks to be performed by the team from HMS Consulting and Technical, LLC and Glosten, Inc. (the Consultants), in support of these efforts.

Listed below in the Scope of Work are the baseline tasks that the Consultants propose to perform to ensure the success of implementing the recommendations. Additional tasks may be added, at the SSA's request, at any stage throughout the planning process.

SCOPE OF WORK:

The scope of work as proposed below is designed to develop the necessary key elements for a complete project lifecycle. This lifecycle includes development of the plan, its execution and ongoing monitoring and adjustments.

i. Planning Workshop

- a. In a structured working session, meet with the governing board and senior staff members of the SSA to review, refine, and prioritize the recommendations from the Report.
- b. Consider alternatives that still meet the objectives of the original recommendations but may be better aligned with available resources or other circumstances.

- c. Develop a strategy for implementing each recommendation.
- d. Establish individual initiatives to implement the recommendations as defined and prioritized by the working group. Assign a Project Manager / Team for each initiative (SSA staff, external resources or other).
- e. Summarize all decisions and direction from the board.

ii. Plan Development

- a. Hold break-out sessions or follow-up meetings with each Project Manager / Team to clearly identify the critical project elements that make up the project plan for each initiative:
 - Identify the scope of work
 - Identify resources required
 - Define responsibilities of Project Team, including the SSA staff, contractors or others
 - Develop a project budget
 - Develop a communications plan
 - Develop a project schedule with clearly identifiable milestones
 - Perform a risk assessment to identify any potential risks and possible mitigating actions to ensure the project is not affected
- b. Utilizing the information acquired in i. **Planning Workshop**, guide and support each project team to develop a project plan for each initiative. Clearly define the scope of work, project schedule, budget and other resource requirements, responsibilities, and communications protocols.
- c. Integrate the individual project plans into an easily managed program portfolio to be utilized by the SSA leadership to monitor progress of all initiatives.

iii. Monitoring, Reporting and Adjustment

Following the standard project lifecycle framework, projects should be monitored for progress against their objectives, budget, and schedule.

- a. The Consultants will communicate bi-weekly with the individual project managers to review progress and, if necessary, make adjustments. When necessary, adjustments to one project may require adjustments to other projects (portfolio management).
- b. Quarterly reports will be presented to the board and SSA staff. These will summarize the progress of each initiative against the plan, modifications to plans and the impact on other initiatives.

DELIVERABLES:

The deliverables for this effort are:

1. Planning Workshop Agenda
2. Implementation Plan Report, including:
 - a. Workshop Summary
 - b. Project Plans for each initiative
3. Bi-weekly meeting summary / plan updates
4. Portfolio Summary Reports, delivered at each quarterly review.

SCHEDULE:

The Consultants are prepared to start immediately upon receipt of a Notice To Proceed. It will take approximately **4 weeks** to plan and prepare for the Planning Workshop. This estimate is subject to availability of the participants.

The planning workshop will be two full days with the primary working group and one half-day with smaller project teams.

Plan development will take 3 to 6 weeks depending on the final initiatives. It is likely these will be staggered.

Three quarterly reviews will be held (every three months following the Planning Workshop).

This proposal reflects the services to be provided for a twelve month duration.

COST AND TERMS:

This effort is proposed on a time and materials basis. We estimate that the effort for performing these tasks will cost **\$135,000**, including an **\$8,000** travel allowance. See the table below for a detailed itemization of the cost estimate.

The scope of work as defined above is subject to the breadth and extent ultimately determined by the SSA and the board. This approach allows the SSA flexibility to adjust the scope of work as deemed necessary.

| Task | Estimated Hours | Labor Costs | Travel Expenses | Total |
|-------------------------------|------------------------|--------------------|------------------------|------------------|
| i. Planning Workshop | 168 | \$32,150 | \$4,000 | \$36,150 |
| ii. Plan Development | 48 | \$9,200 | | \$9,200 |
| iii. Monitoring and Reporting | | | | |
| a. Bi-weekly Reviews | 208 | \$37,900 | | \$37,900 |
| b. Quarterly Reviews | 270 | \$51,700 | \$4,000 | \$55,700 |
| Subtotals | 694 | \$126,950 | \$8,000 | \$134,950 |

1. Expenses for travel will be billed at cost pending pre-approval by the SSA.
2. All invoices will be submitted to:

Robert Davis

General Manager

All work performed under this agreement shall be subject to the attached terms and conditions.

See Attached:

- HMS Standard Terms and Conditions

SUBMITTED / APPROVED:

Proposal submitted by: John A Sainsbury 02/07/19

Proposal approved by: _____ (Date) _____
(Signature)

(Name)